

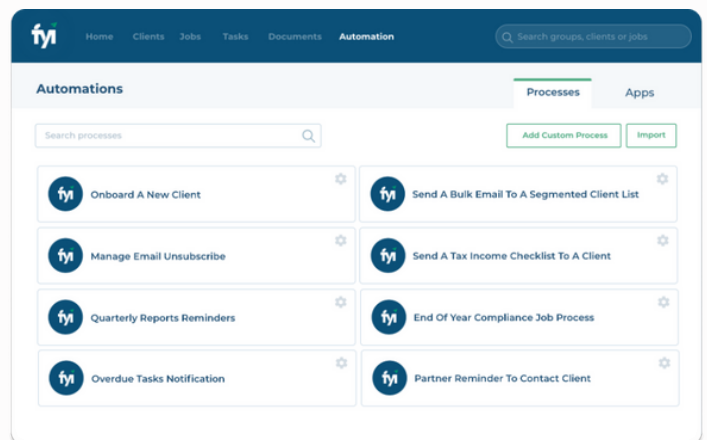
# Process Automation with FYI



## Make every second count for more with process automation

FYI's automation engine liberates accountants by halving the time spent on compliance and admin. Allowing practices to spend less time on daily admin and deliver exceptional client service.

- ✓ Using FYI for Process Automation
- ✓ How to get started with FYI's Automation Engine
- ✓ Key benefits of Process Automation with FYI

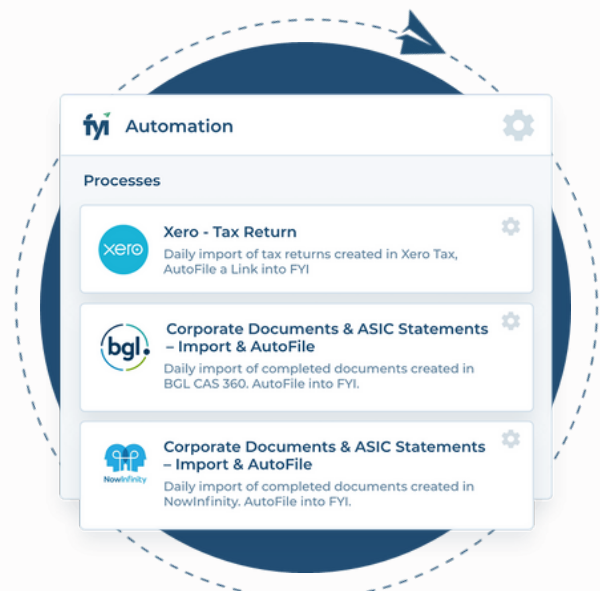


FYI's automation engine allows you to automate repetitive tasks and recover more time for what counts - work that adds more value for your practice and clients.

Leverage process automation to spend less time retrieving and filing documents, automatically importing and filing important client documents.

Make sure nothing is missed with FYI you can automate reminders when tasks are overdue, documents are uploaded, signed or ready for approval and much more.

Deliver the best client service ever with FYI's process automation.



# Automate to save hours on routine work



## Spend less time retrieving and filing documents

Automatically import and file tax returns, assessments, financial reports, corporate compliance and other documents.



## Let FYI remind you of the important stuff

Make sure nothing is missed! Receive automatic reminders when tasks are overdue or documents are uploaded, signed or ready for approval.



## Deliver the best client service ever

Automate new client onboarding, quarterly report reminders, income tax return checklists, reminders to contact important clients and more.



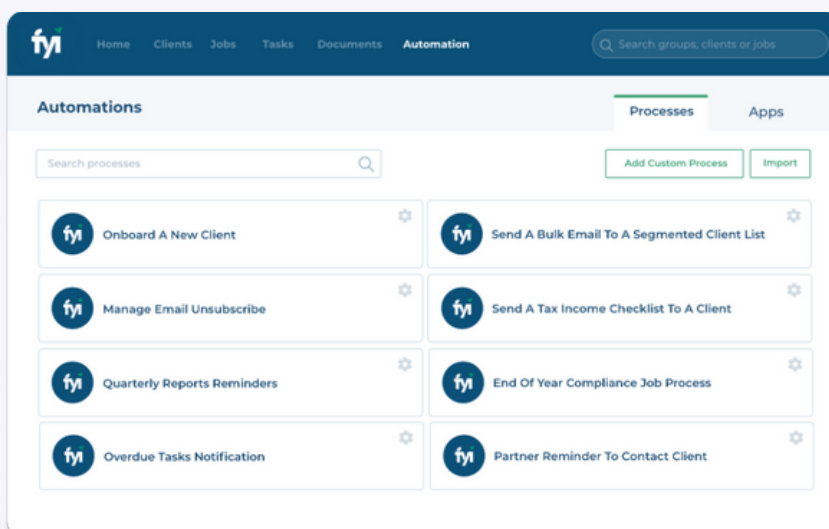
## Automate tedious compliance work

Let FYI auto-create the meetings, tasks, emails and documents for repetitive compliance work, with job states and key dates automatically updated as you go.



## Make email marketing a breeze

Send an email or e-newsletter to your entire client base or a segmented list. You can even include attachments and auto-manage email unsubscribes.



FYI's automation engine is not only designed to save accountants time but also significantly reduce human error, streamline and standardise processes reducing overall risk whilst improving overall operational effectiveness.

## How to get started with FYI's Automation Engine

Save your practice countless hours by automating daily admin tasks and processes, freeing up time for work of higher value.

### Sample processes out of the box

Get started today with a range of in-built sample processes. Automate the retrieval of information from the ATO, Xero, BGL, NowInfinity and other sources.



### Create your own custom automations

Create your own automations across client services, marketing, admin or HR. Re-engineer your processes to improve responsiveness and efficiency - limited only by your imagination!

Begin by mapping out how you would normally complete a process in practice. Use our Automation Workbook to assist with mapping your process and adding your custom process into your FYI platform.

**Still not sure where to start? Take our [Automation Quiz](#)**



### Import pre-built automations

Choose from a growing library of automations created by the FYI team! Our library has a wide range of processes commonly used in accounting practices. Simply import, customise to suit your practice, test and activate.



## Using FYI Process Automation

The more processes you automate in your practice, the faster the efficiencies add up. Proven ROI > Time savings of up to 20% within 3 months, find out more [here](#).

### More benefits of automating processes within your practice

- ✓ **Time savings**  
Automating repetitive tasks can save you countless hours when extrapolated across your client base for tasks like, filing and creating documents, updating job states and so much more.
- ✓ **Reduce risk**  
Remove the risk of human error from your processes entirely with the automation engine. Ensuring it's completed right first time every time, with full visibility and control!
- ✓ **One way of working**  
Standardise the way your team work, ensuring the same documents and steps are followed by everyone every single time.
- ✓ **Deliver a great client experience**  
Provide a consistent client experience across all services, go above and beyond and proactively communicate using automations to delight your clients time and again.
- ✓ **No need to start from scratch with the Automations Library**  
Pre-built automations for common processes across accounting practices, ready to import and activate for your team and clients.



Massive efficiencies come from the automations - that we can only do because we use FYI for document management.

STACIE SHAW,  
PARTNER  
PKF NEWCASTLE & SYDNEY



Make every second count for more with FYI Process Automation  
**For more information on Process Automation with, visit the  
FYI Help Centre at [support.fyidocs.com](https://support.fyidocs.com)**